Office of Information Technology Services

Project Portfolio Management Tool

Agency IT Plan Submission Instructions

Table of Contents

1 Document History

1.1 Revision History

Revision #	Revision Date	Description of Change	Author
1.0	7/18/2006	Initial Document	B. Swartz

2 Purpose

The purpose of this document is to assist agencies with adding Agency IT Plans to the Project Portfolio Management (PPM) Tool.

3 Getting Started

To add an Agency IT Plan to the PPM tool, the user must have authorized access and be designated as a Contributor. The web address for PPM is https://www.ppm.state.nc.us/UMTNC/. If you do not have a license for PPM, contact the CIO of your agency for the names of the licensed contributors. One of these contributors should be able enter the Agency IT Plan for you.

To obtain a copy of the Agency IT Plan workflow go to http://www.scio.state.nc.us/PortfolioManagementInitiative/AgencyITPlansBudgetRequestsRoadmaps.asp. The Agency IT Plan section contains a document titled Agency IT Plan Workflow.

4 Adding an Agency IT Plan

The Agency IT Plan should be entered in the PPM tool as a new project. The user should enter the new project with the name '[Agency Name] - IT Plan.' Detailed data entry instructions are included in Section 5.

4.1 Required Information for Agency IT Plan

Project Info Tab:

- Project Name – [Agency Name] – IT Plan
- Start Date – October 1, 2006
- End Date – June 30, 2009
- Capitalization Period – 60 Months
- Project Range – IT Plan
- Type of Project – IT Plan
- Department of Agency – Agency Name
- Division – Agency Name
- Project Sponsor – Agency Head or CIO
- Expansion Budget Request – No
- Contributor – Staff Member Entering Data

Document Management Tab:

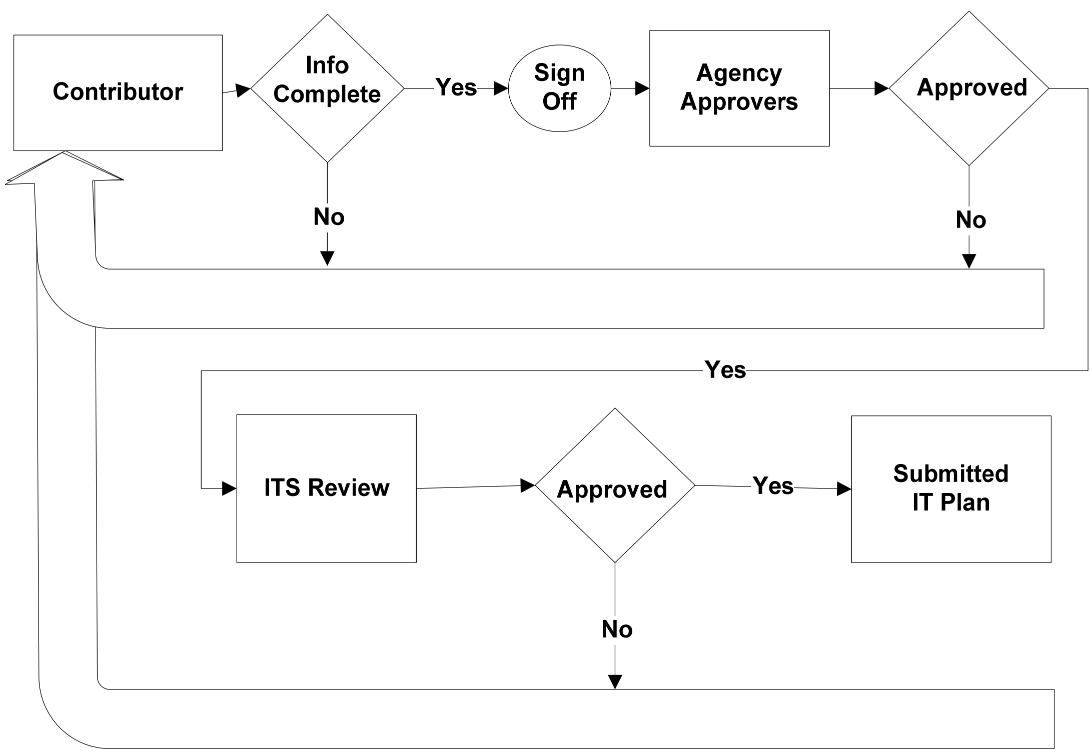
- Agency IT Plan

4.2 Agency IT Plan Workflow

Within the tool, the Agency IT Plan flows from the Contributor to the Agency Approvers (typically Agency CIO and Agency CFO) to the Office of the State CIO. When all required information is entered, the Contributor signs off to move the project to the next stage in the workflow. In the next stage, Agency Approval, the Agency Approvers (typically Agency CIO and Agency CFO) sign off to move the project to State CIO review. The SCIO will signoff to signify that the plan has been submitted.

The process is shown in the following diagram.

<u>Agency IT Plan Workflow Diagram</u>



5 Detailed Data Entry Instructions

	Project Portfolio Management Tool
	Log on to the State of North Carolina Project Portfolio Management Tool at https://www.ppm.state.nc.us • Click on the 'Add' tab at the bottom of the screen. • Select your agency from the 'Organization Hierarchy' drop down box. • Select 'Project' from the Entity drop down box. • Click on 'Add Entity'. • The 'Project Info' tab displays.
	Project Info tab:
	Project Info is the default screen for all projects. • Project Name – [Agency Name] – IT Plan • Start Date – October 1, 2006 • End Date – June 30, 2009 • Capitalization Period – 60 Months • Project Range – IT Plan • Type of Project – IT Plan • Department of Agency – Agency Name • Division – Agency Name • Project Sponsor – Agency Head or CIO • Expansion Budget Request – No • Contributor - Staff Member Entering Data • Click **Update** at the bottom of the screen to save the data.

	Document Management tab:
	Click on the “diamond” on top line right corner and select **Document Management** on the drop down list to add the IT Plan. • Click on New Document. • Enter Document Name. • Browse to select file to attach. • Attach IT Plan. • Click Create.
	Sign Off
	• Go To Project Info tab. • Click on Workflow link. • Click Signoff button at bottom of page. • Select Approve • Click on **Update** (bottom of page) to save data. Note: After Contributor signs off, an e-mail will be sent to Agency Approvers. They will use the same steps to approve/reject the plan.

6 Contacts

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